APPENDIX - A

6 bizproductivity Sales Tracker Tracker Tracker



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Glossary

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Making Additions and Changes

Add Data by Importing

Add New Contact

Data Entry

Deal Status

Change Contact Data

Add or Change Notes

Add Action Items

Add or Delete Products - Sales Level

Management Level Add or Delete Products -

Add, Update, Delete Users

Add Data by Importing

If you have sales data in a file or another sales tool, you may want to import that data in a batch rather than manually enter it into Sales Tracker. Go to Importing Your Contact Data for more information.

Add New Contact

NO NO NO	TO VIEW	THEN:::
		to fled act out as all in the
My Database >	The Add New Contact	1. Complete the fields on the top han or the screen.
Add New Collide	form.	2. Add notes, action items, or products
Contacts >		
Add New Contact	-	3. Click on the go button to submit the
		data.

Data Entry

The user types contact personal data in the fields on the left side of the screen. Fields which require a data entry are marked with an asterisk (*). All other fields are optional

The fields on the right side of the screen concern Deal Status and information about the business. A pop-up window displays when you select a Deal Status which requires you to update other fields.

these items on the navigation bar, and the add window will display on the bottom half of You can also add notes, action items, and products to your contact data. Just select the Contacts screen.





Making Additions and Changes

Add Data by Importing Add New Contact

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Deal Status

features of the software you must update the Deal Status field. The initial Deal Status is can also be changed from the My Database screen or by using the Deal Status Process "New Lead". The status is changed by selecting from the pulldown menu. Deal Status Deal Status is not a required field, but to take advantage of the main sales tracking

The Deal Status selections are:

Initial status "New Lead"

"Attempt Contact"

pop-up = Probability of Sale

"Qualified Lead"

"Not Qualified"

"Proposal Sent"

pop-up = Probability of Sale, Deal Amount, & Expected Close Date

pop-up = Probability of Sale, Deal Amount, & Expected Close Date "Proposal Accepted" pop-up = Probability of Sale; Deal Amount, & Expected Close Date "Contract Pending"

pop-up = Dollar Amount of Sale, Actual Close Date "Closed Sale"

Rejected By Buyer, Terms Rejected By Seller, Credit Not Approved pulldown menu = No Response, Proposal Rejected, Terms

For more information on Deal Status, go to Using the Deal Status Process Map.





Making Additions and Changes

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Change Contact Data

	- Control of the Cont	
CLICK ON	ТО	THEN
Any contact name on the Home Page or My Database selected selected	View the Contacts screen 1. Make your changes for the contact name 2. Click on the go butto selected	 Make your changes Click on the go button
Contacts	View the Contacts screen	 Select the contact from the pulldown menu
		2. Make your changes
		3. Click on the Contacts go button

Add or Change Notes

Whenever you change contact data, you can also add or change notes.

 		_
THEN	Select the contact from the pulldown menu Add or edit notes in the Notes window Glick on the go button in the Notes window	
ТО	View the Add Notes window at the bottom of the Contacts screen.	
CLICK ON	Contacts > Add Notes	

The current date and time will display automatically, but you can change these items.





Making Additions and Changes

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Deal Status

Change Contact Data

Add or Change Notes

Add Action Items

Add or Delete Products - Sales Level

Add or Delete Products -Management Level

Add, Update, Delete Users

Add Action Items

CLICK ON	TO	THEN
Contacts >	View the Add Action	1. Select the contact from the pulldown menu
Add Action Items	Items window at the bottom of the Contacts	2. Select an Action Item from the Action Item pulldown menu
	screen.	3. Fill in the Requested Date if it applies
		4. Select a Priority from the pulldown menu
		5. Click on the go button in the Notes window

The "Action Item #" displays automatically.

When you click on the "Completed" box, today's date is entered unless you change it.

Add or Delete Products - Sales Level

THEN	View the Add Products 1. Select the contact from the pulldown menu	2. Select a Product from the Product pulldown menu	3. Select a Model type if it applies	 If you are deleting the selected product from this contact's data, then click on the Delete 	pox	5. Click on the go button in the Products window
TO	View the Add Products	window at the bottom of the Contacts screen.				
CLICK ON	Contacts >	Add Products				

Sales level users can select products from the pulldown menu to be added to or deleted from the data for a specific contact. They cannot add products to the list in the pulldown menu. This is a management level function.





Making Additions and Changes

Add Data by Importing

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Add Action Items

Add or Delete Products - Sales Level

Add or Delete Products -Management Level

Add, Update, Delete Users

Add or Delete Products - Management Level

_		
	THEN	Follow the instruction on this screen to add or update the list of products to be viewed by all sales levels
	ТО	View the Add/Update Product Table screen.
	CLICK ON	Management > Update Product Table

Add, Update, Delete Users

This is a Management function only.

THEN	 To Add a User - select "Add User" from the pulldown menu, complete the fields, and click on the go button 	 To Update a User - select the user's name from the pulldown menu, change the information, and click on the go button 	 To Delete a User - select the user's name from the pulldown menu, click on the Deactivate box, and click on the go button
	• To Ac	• To Ur pulld the g	• To De pulld on the
TO	View the Users screen.		
CLICK ON	Management > View the Users Update Users		





Navigation Bar

Getting Around

Navigation Bar

Table Selections

Sort Columns

Directional Buttons

Current selection is highlighted

The Sales Tracker navigation bar is visible at the top of each page. Use it to easily move

from one screen to another.

Main selections on top

Home Wy Databeter Contract

Sub-selections on bottom

- Click on a main selection to display sub-selections. NOTE: Not all main selections have sub-selections.
 - Click on a sub-selection to display a new page or partial page dealing with the selected topic.
- Click on the on the navigation bar to open the Help Index in a separate window.

Table Selections

Some screens display your data in table format. Clicking on certain items in the tables will open a window where you can view and edit the data for the items selected.

an action itemMy Action Items (Homepage)Add Action Items windowa contact nameMy Top Prospects (Homepage)View Notes windowa contact nameView DatabaseView Notes windowan item #View Action ItemsAdd Action Items window	CLICK ON	IN TABLE	TO DISPLAY THE CONTACTS SCREEN PLUS
name My Top Prospects (Homepage) name View Database View Action Items	an action item	My Action Items (Homepage)	Add Action Items window
name View Database View Action Items	a contact name	My Top Prospects (Homepage)	View Notes window
View Action Items	a contact name	View Database	View Notes window
	an item #	View Action Items	Add Action Items window

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Getting Around

Navigation Bar

Table Selections

Sort Columns

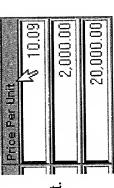
Directional Buttons

Sort Columns

alphanumerically while dates are sorted oldest to most recent. Click on any table column heading to sort the data in that column. Sorting order is based on the type of data in the column. For example, text and numbers are sorted



click on heading to sort



Directional Buttons

Arrow buttons display at the bottom of a table if the data does not fit on your screen. Click on the arrow buttons to scroll through the table and view all of your data.

scroll to end scroll down one screen scroll up one screen ¥ scroll to beginning---

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Importing Your Contact Data

About Importing Your Contact Data

Importing from a Spreadsheet

Importing from a Word Processing

Importing from another Sales Tool

Using the Import Feature

Sample Table

Sample Column Order

About Importing Your Contact Data

Use the My Database > Import Contact Data function to easily import your sales data from existing electronic files into Sales Tracker. My Delations Contacts Action Items Reporting Management Service/Help Log Out

or in the database of another sales tool, you can upload the data by saving it in a text file Whether you have sales contact data in a spreadsheet, a word processing file, a text file, using a column delimiter.

For example:

- as a Text Only file (.txt) with a comma, semicolon, space or tab as the column delimiter;
- or, as a Comma Separated Value file (.csv) which automatically places a comma as the column delimiter.

Importing from a Spreadsheet

If your data is in a spreadsheet format, you should be able to save the file as either a Comma Separated Value (.csv) file or as a delimited Text (.txt) file.

Importing from a Word Processing File

use, your data should be in either column or table format. NOTE: Do not save your file in Rich Text Format (.rtf). Most word processing programs let you save your files in Text format. The process may differ between programs but should be self-explanatory. No matter what program you

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mporting Your **Contact Data**

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click on 'Convert Table to Text...' When you are asked to select a text separator, chose In some word processors, such as Microsoft Word, you should convert your tables to text before you save the file. To do this, select the entire table and in the Table menu either the comma or the tab.

Importing from another Sales Tool

Exporting Your Contact Data to learn about the exporting data feature in Sales Tracker. This should not be a problem as most sales tools have an 'export data' feature. See,

Using the Import Feature

Once your data is in a Text or CSV file format, follow these steps to import the data.

1. Enter the location of your data file (full path), or click the Browse button to locate and select the file.

Specify file name: | C:\Mydata\Contacts.csv

Browse. 1

- 2. Click the View button to view a sample of your data file.
- · Make sure your text is in the correct format for importing. Text should be in rows with column data separated by a delimiter (comma, semicolon, space, or tab)
- If you do not see a character or space separating your column data, or if unusual characters are displayed, you should try converting your file again.
- a CSV (Comma Separated Value) file. Do not save it in RTF (Rich Text Format) as Make sure when you convert your data file that you save it as a TEXT ONLY file or this will save some formatting commands which will cause those unusua characters to display.





Importing Your Contact Data

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For Example:

Here is a sample table of contact data as it would appear in a word processing file.

Contact Name	Business Name	Address	City	State	Zip	Phone	
B.Quik	Qwik Printing	123 Paper Chase	Reading	PA	19601	484-767-7870	
I.M.Hungry	Deli Delivery	45 Market St.	Center Sandwich	HN	03227	603-336-8765	
A.Peach	Fruit-To-Go	67 Lemon St.	Grapeland TX	TX	75844	409-449-9999	
Pep R. Roni	Rolling In Dough 89 Crusty Lane	89 Crusty Lane	Naples	NY	14512	716-999-1212	
U.R.Going	Heavenly Travel	Heavenly Travel 10 Gold Star Hwy. Mystic	Mystic	ದ	06355	860-561-2334	

Here is the same table previewed in Sales Tracker after it was saved as a CSV file.

To view the sample data press

Contact Name, Business Name, Address, City, State, Zip B. Owik, Owik Printing, 123 Peper Chase, Reading, PA, 19601 I.M.Hungry, Deli Delivery, 45 Market St., Sandwich, NH, 03227 A. Fruit Fruitto-Ga. 67 Leman St., Grapeland, TX, 75844

Pep R. Roni, Rolling In Dough, 89 Crusty Lane, Naples, NY, 14512 U.P.Going, Heavenly Travel, 10 Gold Star Hwy, Mystic, CT, 06355

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Importing Your **Contact Data**

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Sample Table

Sample Column Order



4. Click on the check box if your data contains column headings. This tells Sales Tracker that your first row is not data.

Check here if file contains header row 🗹

5. In the 'List of Columns' box click on an item that best describes the first column of data in your file, then click on the arrow button to place that item in the 'Column Order' box. Continue this process for each column of data in your file.

Tracker. The software can now import your data to display correctly in Sales Tracker. This process matches the columns in your file with the columns viewed in Sales

Here is the column order for our sample table shown in step 2.

Column order in file

List of columns are

Company Address 1

Address 2

Sompany Address 1 Contact



State

Phone State

6. Make sure your entries are correct, then click the Import button to upload your file.





Viewing Your Data

Priorities

Database

Contacts

Reports

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This table describes the various ways you can view your data in Sa
T

CLICK ON	TO VIEW
Home	Priority items - your top five Action Items and top five Prospects
My Database > View Database	ALL of your current data in table format. To view your archived data in the table, click on the check box above the table.:
	☑ Click here to Display Archived Records
My Database > Query Contact Database	A data entry screen allowing you to search the database for specific information.
	Make your entries and click on the GO button to display the View Database table. The table will contain ONLY the data you requested in your search.
My Database >	A table of all products entered in the database.
View Product Table	Maintaining the master product table is a management function.
Contacts >	The View Notes window at the bottom of the Contacts screen.
View Notes	View all notes associated with the displayed contact.
Contacts >	The View Action Items window at the bottom of the Contacts
View Action Items	screen.
	View all action items associated with the displayed contact.
Contacts >	The View Products window at the bottom of the Contacts
View Products	screen.
	View all products associated with the displayed contact.

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Viewing Your Data

Priorities

Database

Contacts

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CLICK ON	TO VIEW
Contacts >	The View Deal History window at the bottom of the Contacts
View Deal History	screen.
	View the Deal Status history associated with the displayed contact.
Action Items	ALL of your current Action Items for ALL Contacts
	This data is in table format.
Reporting > Contacts	A data entry screen allowing you to select and sort specific Contact information to display in a report.
	Make your entries and click on the GO button to display the Contacts Report. The report will contain ONLY the data you requested.
Reporting > Action Items	A data entry screen allowing you to select and sort specific Action Items to display in a report.
	Make your entries and click on the GO button to display the Action Items Report. The report will contain ONLY the data you requested.
Reporting >	A selection screen allowing you to select a reporting period to display sales activity for each step in the Deal Status process.
Daily	Make your selections and click on the GO button to display the
Weekly	Activity Report. The report will contain the Deal Status
Monthly	פמוווווומופס וסו יוופ ליסוסת ליסו יכליים
Reporting > Sales Funnel	A graphical report of the sales cycle (or funnel) as it relates to the Deal Status process for all contacts.
	This report is a visual representation of the number of your contacts currently associated with each Deal Status step.

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Viewing Your Data

Priorities

Database

Contacts

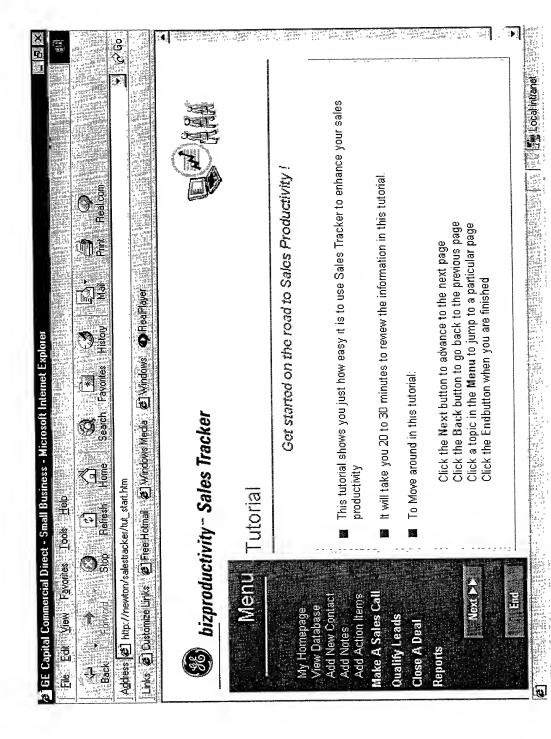
Reports

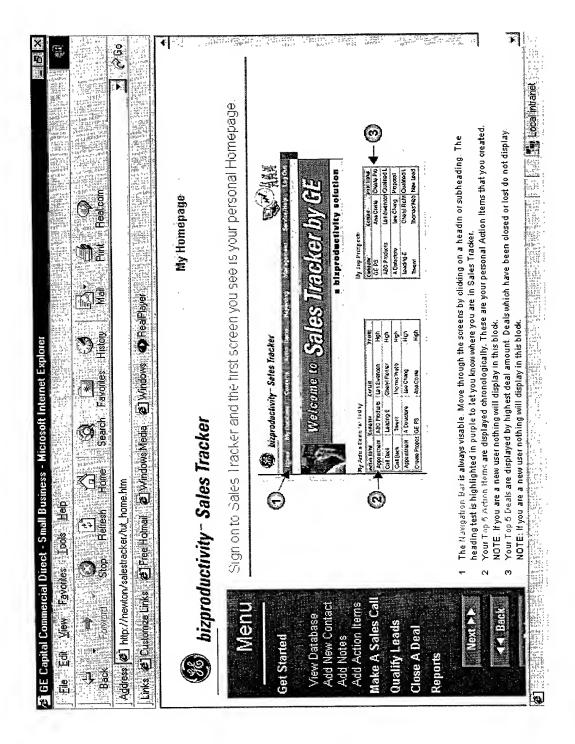
CLICK ON	TO VIEW
Reporting > Sales Forecast	A selection screen allowing you to select a reporting period to display sales forecasts for each of your contacts.
	Make your selections and click on the GO button to display the Sales Forecast Report. The report will show the sales forecast for each contact based on Deal Amount and Expected Close Date.
Reporting > Won & Lost Deals	A data entry screen allowing you to enter a date range for displaying all of your contacts with a Deal Status of Sale Closed or Loss.
	Make your date entries and click on the GO button to display the Won & Lost Deals Report. The report will display two tables: the Won Deals table and the Lost Deals table.
Reporting > Products	A report of all products entered in the database master product table.
	This report contains the same data available from My Database > View Product Table.

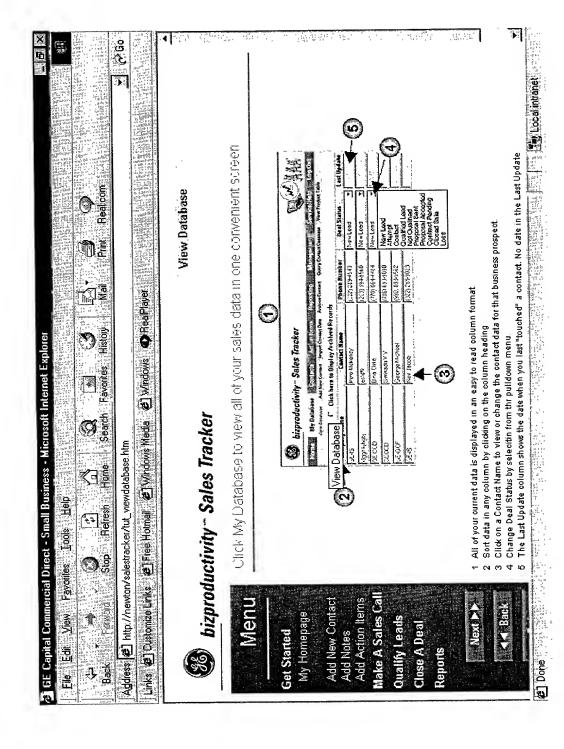
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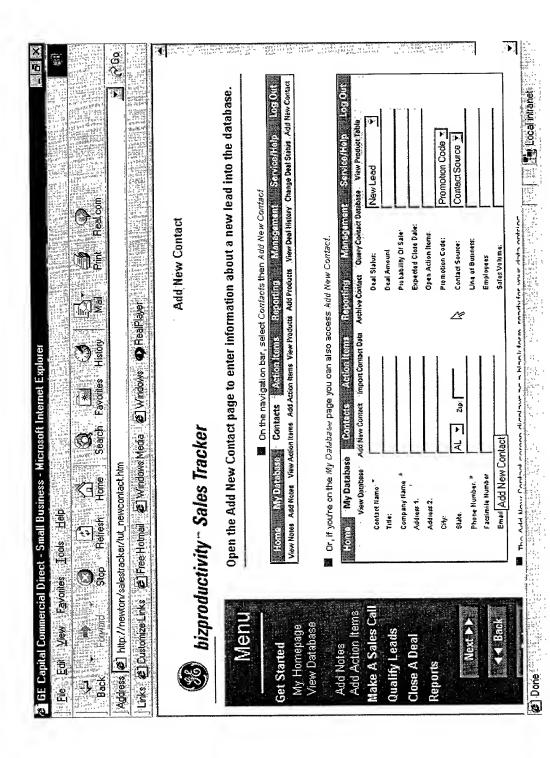
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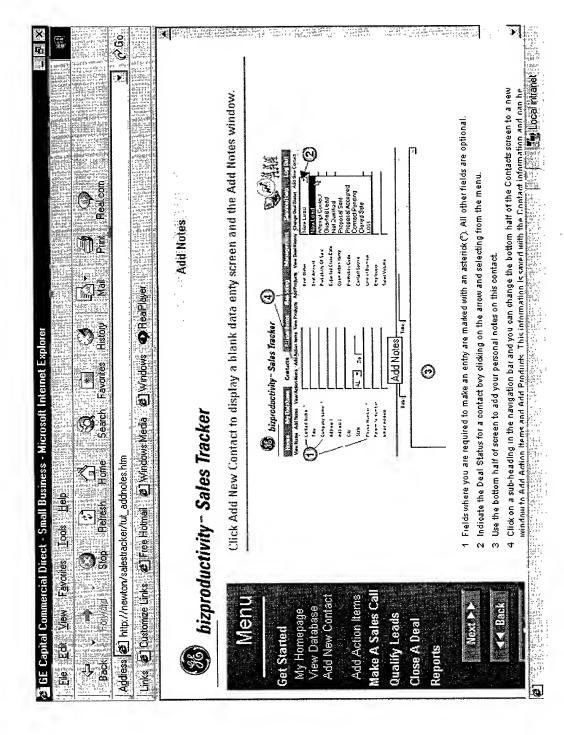
APPENDIX - B

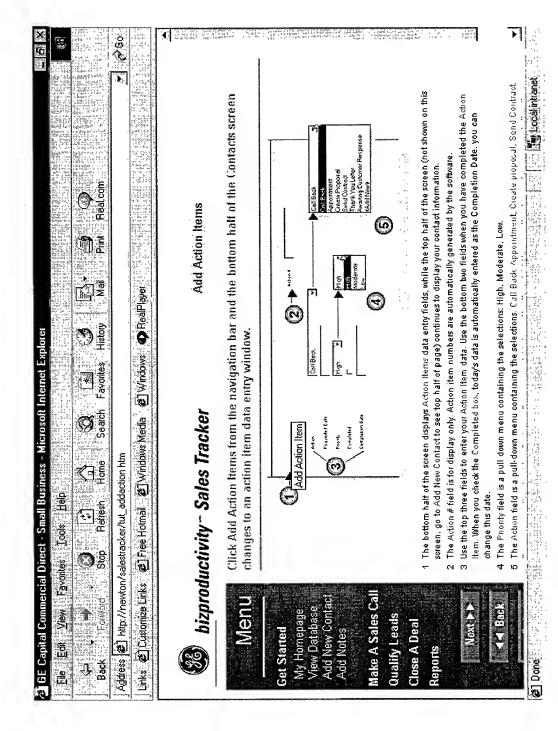


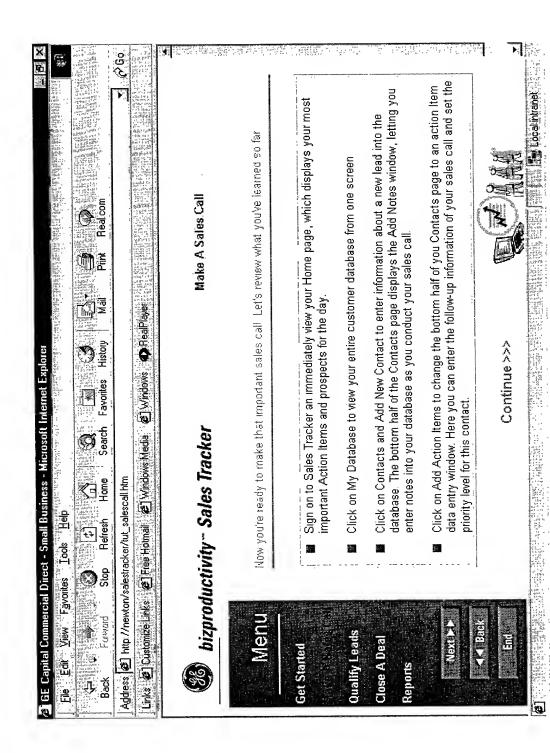


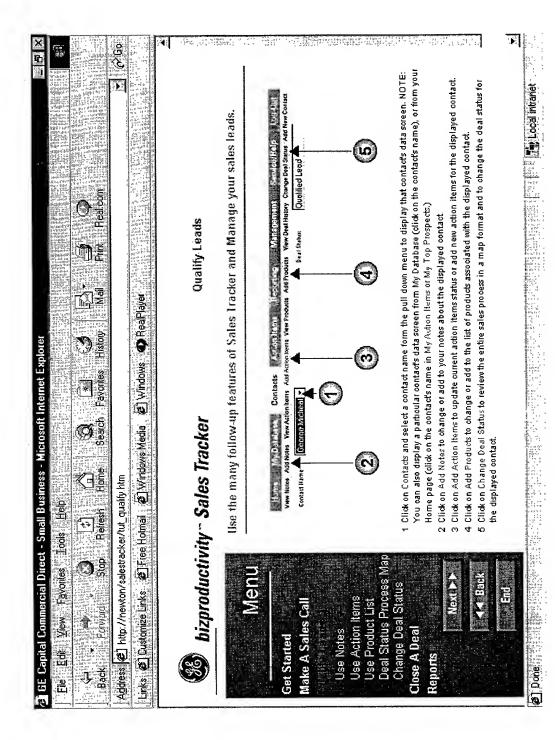


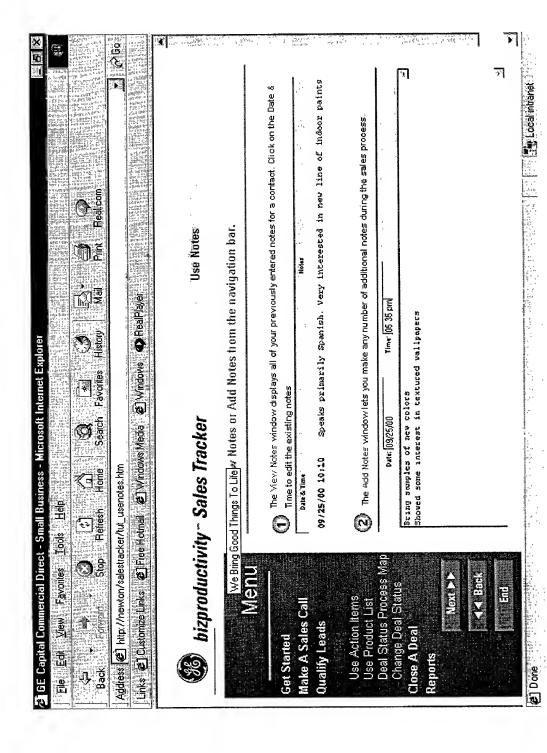


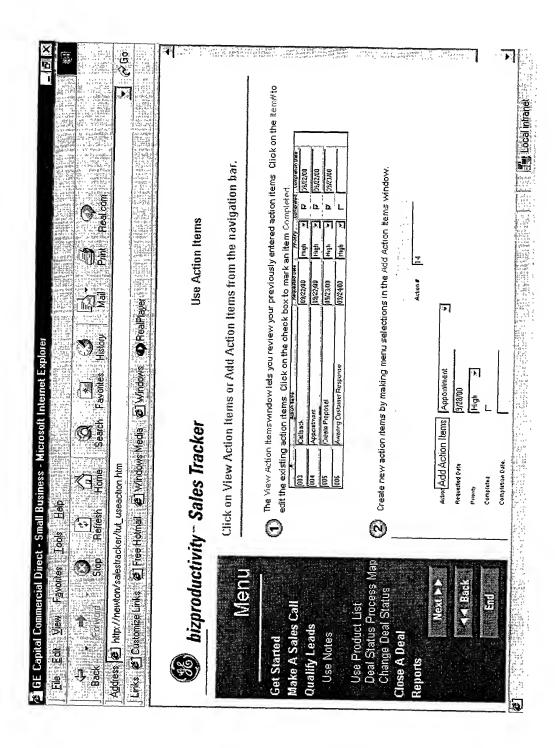


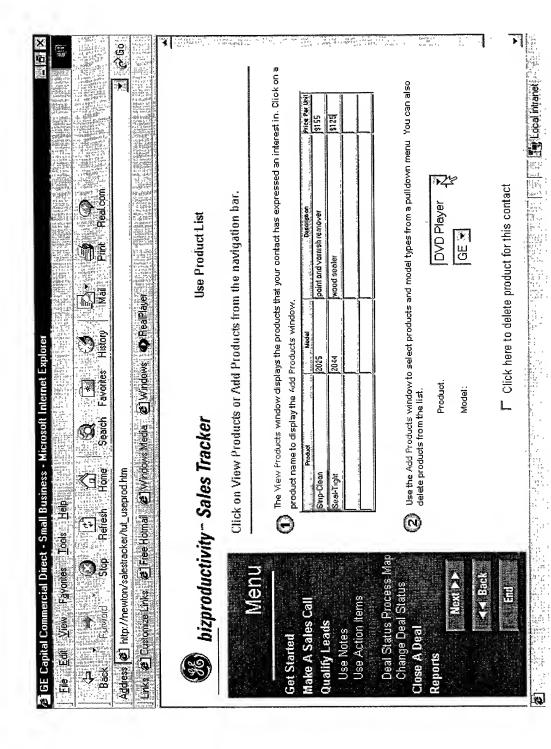


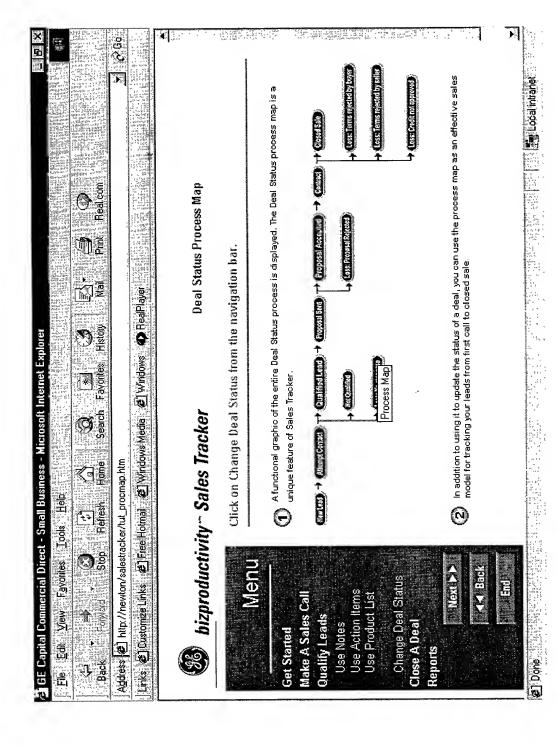


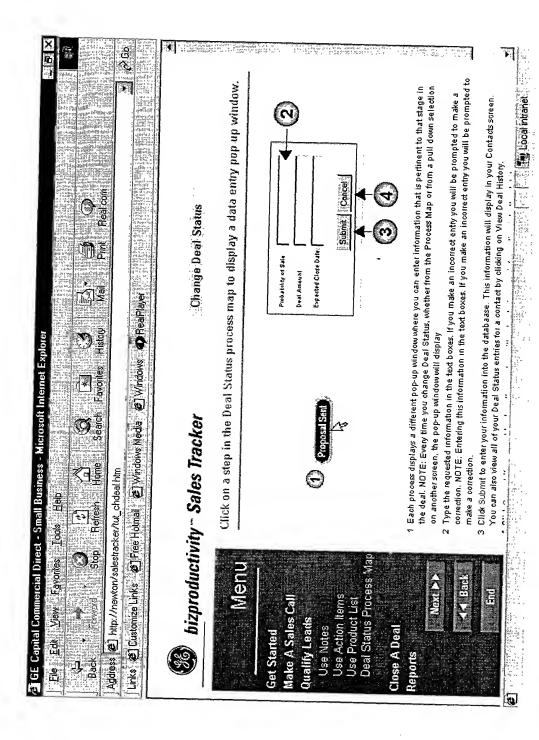


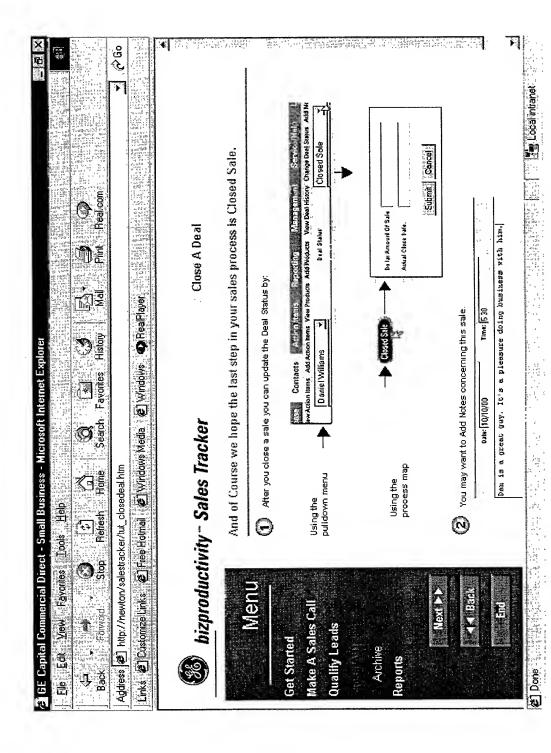


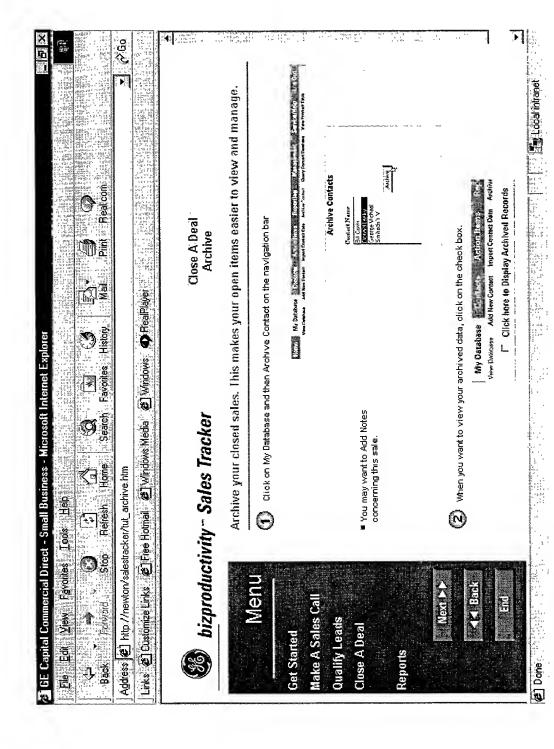


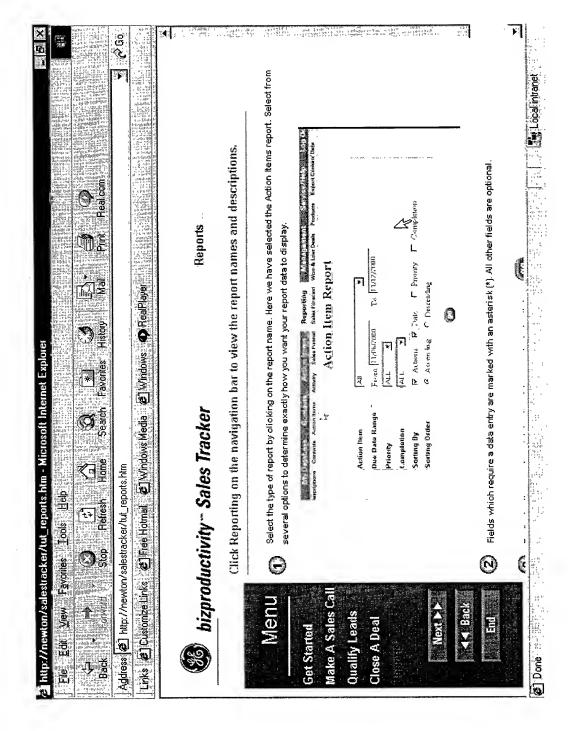


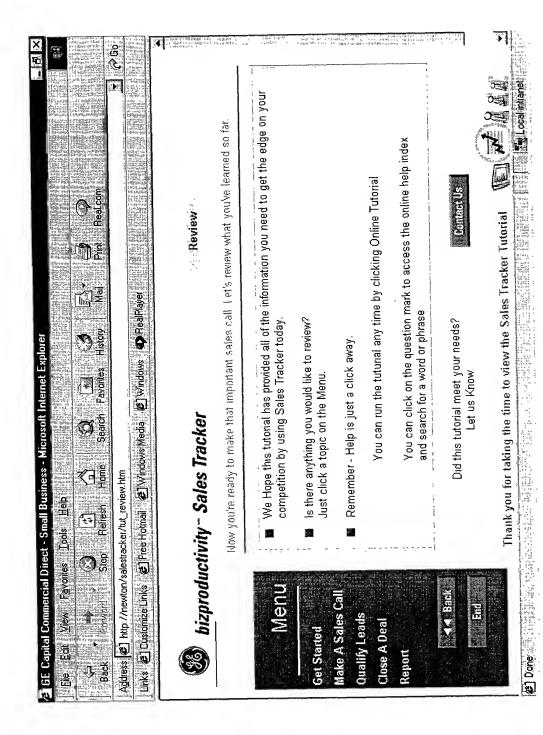


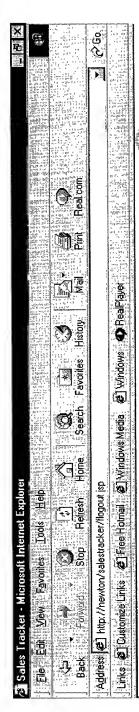














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Service Halo

CATAIN LOG

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